

State of Maine
RFP / Proposal Master Score Sheet

SCORESHEET FOR RFP# 202010147 Integrated Online Service Independent Validations and Verification (IV&V)							
PROPOSAL SUBMITTED BY:		Berry Dunn McNeil & Parker, LLC		Cigniti Technologies Limited		CSG Government Solutions, Inc.	
COST:		Cost:	\$ 596,525.20	Cost:	\$ 614,890.00	Cost:	\$ 724,320.00
EVALUATION ITEM	POINTS AVAIL.						
Section II: Organization Qualifications and Experience	25	19.00		10.00		23.00	
Section III: Proposed Services	40	30.00		15.00		37.00	
Section IV: Cost Proposal	35	33.17		32.18		27.31	
TOTAL	<u>100</u>	82.17		57.18		87.31	
PROPOSAL SUBMITTED BY:		KSM Consulting, LLC		Maximus US Services, Inc.		Public Consulting Group, Inc.	
COST:		Cost:	\$ 763,400.00	Cost:	\$ 749,180.01	Cost:	\$ 565,280.00
EVALUATION ITEM	POINTS AVAIL.						
Section II: Organization Qualifications and Experience	25	12.00		21.00		17.00	
Section III: Proposed Services	40	22.00		26.00		26.00	
Section IV: Cost Proposal	35	25.92		26.41		35.00	
TOTAL	<u>100</u>	59.92		73.41		78.00	

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D.
Commissioner



Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

Award Justification Statement RFP# 202010147 Integrated Online Services

I. Summary

Through RFP# 202010147 the Department sought proposals for Integrated Online Services. Six (6) Bidders responded to the RFP: Berry Dunn McNeil & Parker, LLC., Cigniti Technologies Limited, CSG Government Solutions, Inc., KSM Consulting, Maximus US Services, Inc., and Public Consulting Group, Inc. Through the evaluation process, CSG Government Solutions, Inc., was determined to provide the best value to the State of Maine.

II. Evaluation Process

An Evaluation Team comprised of State employees, applied the consensus method in scoring the Bidders Qualifications & Experience, and Proposed Services. Scores for the Cost Proposal were assigned using a mathematical formula.

III. Qualifications & Experience – CSG Government Solutions, Inc.

- Experience with integrated eligibility systems and modernization projects.
- History with the Department as the IV&V vendor for our Business Rule Engine (BRE) modernization and Oracle Policy Automation (OPA) rule set.
- Indicates CSG Realize, which is a library of resources for the IV&V team to use templates and other subject matter.

IV. Proposed Services – CSG Government Solutions, Inc.

- Main goal is to bring value and utilize Foundational Principles and adhere to industry best practices and standards.
- Will consolidate the nuance federal requirements between, Food Nutrition Services (FNS) and Centers for Medicaid Services (CMS) and Administration for Children and Families (ACF).
- Have training resources within the TeamCSG and will utilize a Deliverable Expectations Document (DED), a deliverable expectations document.

V. Cost Proposal

CSG Government Solutions, Inc., provided a cost of \$724,320.

VI. Conclusion

The strengths of CSG Government Solutions, Inc., proposal include a strong organization with relevant experience, a complete and detailed proposed scope of service and a competitive cost proposal. The Evaluation Team has determined the proposal submitted by CSG Government Solutions, Inc., represents the best value to the State of Maine.

From: [Charette, Thomas](#)
To: [Eduardo Daranyi](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - BD
Date: Monday, November 30, 2020 9:23:06 AM
Attachments: [AL_RFP_202010147 - BerryDunn.pdf](#)

Good morning Mr. Daranyi,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333
(207) 287-8604

RFP.DHHS@maine.gov

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Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: edaranyi@berrydunn.com

Berry Dunn McNeil & Parker, LLC
Eduardo Daranyi, Principal
100 Middle Street
Portland, ME 04101

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Mr. Daranyi;

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office for Family Independence. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

- CSG Government Solutions, Inc.

CSG Government Solutions, Inc. (CSG), received the evaluation team's highest ranking. The Department will be contacting CSG soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and CSG. CSG shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

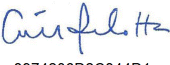
As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract.

Any person aggrieved by this award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

8974206D2C844D1...

Anthony Pelotte
Director
Office for Family Independence

From: [Charette, Thomas](#)
To: [William A Keller](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - Cig
Date: Monday, November 30, 2020 9:22:55 AM
Attachments: [AL_RFP_202010147 - Cigniti.pdf](#)

Good morning Mr. Keller,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: william.keller@cigniti.com

Cigniti Technologies Limited
William A. Keller
433 E. Las Colinas Blvd. Suite 1300
Irving, TX 75039

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Mr. Keller,

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office for Family Independence. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

- CSG Government Solutions, Inc.

CSG Government Solutions, Inc. (CSG), received the evaluation team's highest ranking. The Department will be contacting CSG soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and CSG. CSG shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.


As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

8974206D2C844D1...

Anthony Pelotte
Director
Office for Family Independence

From: [Charette, Thomas](#)
To: [Dufresne, Robin](#)
Cc: [Charette, Thomas](#); [Pelotte, Anthony](#); [Courtois, Shannon](#); [Cohen, Dan](#); [Pruett, Jamie](#); [Farnsworth, Jeffrey L](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - CSG
Date: Monday, November 30, 2020 9:23:00 AM
Attachments: [AL_RFP_202010147 - CSG.pdf](#)

Good morning Ms. Dufresne,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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Jeanne M. Lambrew, Ph.D.
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Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: rdufresne@csgdelivers.com

CSG Government Solutions, Inc.
Robin Dufresne, Health and Human Services Practice Director
180 N. Stetson Ave., Suite 3200
Chicago, IL 60601

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Ms. Dufresne;

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office for Family Independence. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

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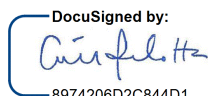
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:


8974206D2C844D1...
Anthony Pelotte

Director

Office for Family Independence

From: [Charette, Thomas](#)
To: [Scott Colip](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - KSM
Date: Monday, November 30, 2020 9:23:06 AM
Attachments: [AL_RFP_202010147 - KSM.pdf](#)

Good morning Mr. Colip,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: scolip@ksmconsulting.com

KSM Consulting, LLC
Scott Colip
111 Monument Circle, Suite 202
Indianapolis, IN 46204

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Mr. Colip;

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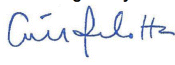
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

8974206D2C844D1...

Anthony Pelotte
Director
Office for Family Independence

From: [Charette, Thomas](#)
To: [Ellen M. Thompson/MAXIMUS](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - Max US Serv
Date: Monday, November 30, 2020 9:23:25 AM
Attachments: [AL_RFP_202010147 - Maximus.pdf](#)

Good morning Ms. Thompson,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: EllenThompson@maximus.com

Maximus US Services, Inc.
Ellen Thompson, Vice President
1891 Metro Center Drive
Reston, VA 20190

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Ms. Thompson;

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office for Family Independence. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

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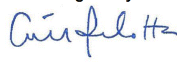
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:


8974206D2C844D1...

Anthony Pelotte

Director

Office for Family Independence

From: [Charette, Thomas](#)
To: [Services](#)
Cc: [Charette, Thomas](#)
Subject: Proposal Evaluation Notification for Office for Family Independence RFP 202010147 - PCG
Date: Monday, November 30, 2020 9:22:52 AM
Attachments: [AL_RFP_202010147 - PCG.pdf](#)

Good morning Mr. Reimers,

The Department's Evaluation Team concluded the evaluations of all proposals submitted for RFP 202010147, Integrated Online Services Independent Validation and Verification (IV & V). The attached letter identifies the awarded Bidder selected through the evaluation process.

Thank you.

Tom Charette
Management Analyst
DHHS/Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, ME 04333

RFP.DHHS@maine.gov

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Maine Department of Health and Human Services
Division of Contract Management
11 State House Station
109 Capitol Street
Augusta, Maine 04333-0011
Tel.: (207) 287-3707; Fax: (207) 287-5031
TTY: Dial 711 (Maine Relay)

11/25/2020

Via Electronic Mail: services@pcgus.com

Public Consulting Group, Inc.
Gary Reimers, Vice President
621 Capitol Mall, Suite 1425
Sacramento, CA 95814

SUBJECT: Notice of Conditional Contract Award under RFP #202010147, Integrated Online Services Independent Validation and Verification (IV & V)

Dear Mr. Reimers;

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Health and Human Services, Office for Family Independence. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to:

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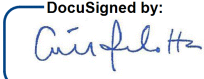
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Thank you for your interest in doing business with the State of Maine.

Sincerely,

DocuSigned by:

8974206D2C844D1...
Anthony Pelotte
Director
Office for Family Independence

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Berry Dunn McNeil & Parker, LLC

DATE: November 6, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
<u>Numerical Score:</u>		
Section II. Organization Qualifications and Experience (Max: 25 Points)	19.00	
Section III: Proposed Services (Max: 40 Points)	30.00	
Section IV. Cost Proposal (Max: 35 Points)	33.17	
TOTAL POINTS (Max: 100 Points)	82.17	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Berry Dunn McNeil & Parker, LLC

DATE: November 6, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 19.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided projects that were relevant.• Specific experience, Medicaid in Ohio - CMS certification process (MELC) and eligibility determination in Missouri.• Extensive local presence.• West Virginia experience with integrated system coordination between multiple federal entities, including CMS, FNS, and ACF.• Extensive collaboration with Deloitte.• History with large Department projects, specifically, CCWIS – 2020, MMIS - 2008 to 2012.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• Proposes a consultant as the senior analyst/technical lead.
3. Organizational Chart
<ul style="list-style-type: none">• Large team for the project.
4. Litigation
<ul style="list-style-type: none">• Two listed, ongoing. The team has not concerns as it relates to the services within the RFP.
5. Financial Viability
<ul style="list-style-type: none">• As a CPA firm, it was noted they were not required to have audited statements.• Provided revenue and condensed statements, letter from TD Bank for the last 24 years in good standing.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Berry Dunn McNeil & Parker, LLC

DATE: November 6, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 30.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Indicates collaborating with the Department, Deloitte and other resources. However, the team is concerned there will be a heavy reliance on project-specific resources.• Lacked details on exactly what and how services will be provided.• Provided a good methodology, Key Performance Indicator (KPI) and Best Practices for monitoring.• Proposed an estimated number of artifacts and how it will align with the cost proposal.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Provided a table to describe how the assessment of project planning requirements will be met.• Proposes working with Deloitte on Agile with specific projects, with a full immersion approach in design sessions.• Addressed deliverables, risk management, scope, training, reporting and integration.• Proposes a time travel testing method.• Proposes to focus on deployment training.• Proposes video-based training for remote staff.• Proposes using the Analysis, Design Development, Implementation and Evaluation (ADDIE) model approach, standard best practice.
C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Provided a communication model, Responsible, Accountable, Consulted Informed (RACI) matrix, standard.• Indicates that most of the staff will be located in Maine.• Indicated being respectful of project staff time and will make arrangements with leadership if desired.• Proposing utilization of Bidder's equipment. However, would need three workstations and ability to work remotely during COVID-19.
D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Provided a management plan and methodology.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Berry Dunn McNeil & Parker, LLC

DATE: November 6, 2020

<ul style="list-style-type: none">• Provided a foundational roadmap.• Provided a deliverable review checklist.• Proposes using KnowledgeLink as a repository, which is a customized version of SharePoint.
E. Reports
<ul style="list-style-type: none">• Proposes sending reports to CMS. However, there is no indication if the reports would be review with program prior to distributing.• Recognition that IV&V feedback can contradict project deliverables, depending on who receives the reports.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Provided a detailed rollout work plan with specific milestones.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Berry Dunn McNeil & Parker, LLC

DATE: November 6, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 33.17

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$596,525.20	x	35 points	=	33.17

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Cigniti Technologies LTD

DATE: November 6, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
<u>Numerical Score:</u>		
Section II. Organization Qualifications and Experience (Max: 25 Points)	10.00	
Section III: Proposed Services (Max: 40 Points)	15.00	
Section IV. Cost Proposal (Max: 35 Points)	32.18	
TOTAL POINTS (Max: 100 Points)	57.18	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Cigniti Technologies LTD

DATE: November 6, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 10.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided relevant projects.• Indicates being the largest independent testing company.• Provided an impressive project list for testing, lacks experience for IV&V, specially DHHS programs.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None.
3. Organizational Chart
<ul style="list-style-type: none">• Provided an organizational chart which indicates a pool of testing experts, however, lacks details that were required in the RFP.
4. Litigation
<ul style="list-style-type: none">• None.
5. Financial Viability
<ul style="list-style-type: none">• Embedded link did not open.• Financials found online are not in U.S. dollars making it hard to determine the financial viability.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Cigniti Technologies LTD

DATE: November 6, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 15.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Did not identify deliverables that an IV&V is required to review.• Indicates modest experience working with federal partners.• Did not indicate policy experience with Federal or State/OFI.• Did not indicate how the verification and validation of the project requirements would be done.• Proposed a detailed chart of the IOS development lifecycle, however, it's not the project required in the RFP.• Indicates review methodology which includes clarity, consistency, completeness, and testability.• Indicates strategic methodology would be to deploy an account manager.• Did not indicate how frequently meets would occur with the Executive Steering Committee.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Provided a chart that adequately captures the requirements for planning.• Design, does not indicate what the plan is for an artifact.• Testing chart is adequate on what will be review, but not how all specific requirements would be met.• Will utilize a train the trainer approach.• Did not address daily communications.
C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Provided 2 technical resumes, however did not demonstrate experience with the requirements in the RFP.• Unclear what can be shared offshore, however would work with the Department.• Did not address the expectation of how many FTEs would be needed from the State.
D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Management Plan PDF link is a templated structure only, does not include this specific project.
E. Reports

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Cigniti Technologies LTD

DATE: November 6, 2020

<ul style="list-style-type: none">• Met requirements.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Provided a roadmap without detailed of dates.• Provided a chart to address the section, but no dependencies listed specifically.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Cigniti Technologies LTD

DATE: November 6, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 32.18

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$614,890.00	x	35 points	=	32.18

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: CSG Government Solutions, Inc.

DATE: November 6, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
<u>Numerical Score:</u>		
Section II. Organization Qualifications and Experience (Max: 25 Points)	23.00	
Section III: Proposed Services (Max: 40 Points)	37.00	
Section IV. Cost Proposal (Max: 35 Points)	27.31	
TOTAL POINTS (Max: 100 Points)	87.31	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: CSG Government Solutions, Inc.

DATE: November 6, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 23.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided relevant projects.• Experience with integrated eligibility systems and modernization projects.• History with the Department as the IV&V vendor for our BRE modernization and OPA rule set.• Indicates extensive public sector experience.• Experience with CMS specific modernization efforts and requirements.• Experience with DHHS programs, includes Medicaid, Food Supplement Program (SNAP) and Temporary Assistance for Needy Families (TANF), and Adverse Childhood Experiences (ACES).• Experience with Deloitte solution being implemented.• Has a center of excellence team.• Utilizes a project bootcamp for onboarding program for specific projects.• Utilizes CSG Realize, which is a library of resources for the IV&V teams to use templates and other subject matter.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None.
3. Organizational Chart
<ul style="list-style-type: none">• Provided.
4. Litigation
<ul style="list-style-type: none">• Provided, the team has not specific concerns as it relates to the services within the RFP.
5. Financial Viability
<ul style="list-style-type: none">• Appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: CSG Government Solutions, Inc.

DATE: November 6, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 37.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
<ul style="list-style-type: none">• Indicates the main goal is to bring value and utilize Foundational Principles and adhere to industry best practices and standards.• Indicates supportive while not consuming an excess of valuable Department and vendor staff time.
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Proposes to consolidate the nuance federal requirements between, Food Nutrition Services (FNS) and Centers for Medicaid Services (CMS) and Administration for Children and Families (ACF).• Proposes to assess the solution from both the user experience and the technical processing behind the scenes.• Proposes an application of lessons learned instead of just documenting them.• Indicates communication includes interviewing and creating a communication approach for each stakeholder.• Indicates observations made by team are vetted/verified and criticality to the project is assessed and delivered in an informal manner to leadership initially.• Proposes frequency of communication is flexible pending the issue and criticality of it.• Indicates awareness of other projects and impacts to and from IOS project.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Provided a descriptive methodology of modeling and testing.• Provided a bulleted list of 7 distinct exercises they plan to conduct as part of planning for the assessment.• Proposes to draw from experiences in other states.• Provided a sample of planning exercise and recommendations.• Provided a list of critical elements to be conducted such as acceptance testing activities, test scripts, defect triage management, regression, test environments, data and procedures.• Proposes train the trainer for cost effectiveness and self-service videos.• Proposes Blooms Hierarchy of Learning, encourages application of training.• Has training resources within the TeamCSG and will utilize a Deliverable Expectations Document (DED), a deliverable expectations document.• Indicate reporting out on trending.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: CSG Government Solutions, Inc.

DATE: November 6, 2020

C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Proposes an approach to utilize augmented staff and CSG Project Advisors are provided at no additional cost to the State.• Indicates the need for two workstations and ability to would work remotely.• Provided a bulleted list of expectations of the Department that is clear and actionable.
D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Provided a management plan.• Indicates the project management plan will be customized to some degree for this specific project and has more sections upon request.• Indicate the use of a Sharepoint program and will customize according to the IOS project needs.
E. Reports
<ul style="list-style-type: none">• Met requirements.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Met requirements.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: CSG Government Solutions, Inc.

DATE: November 6, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 27.31

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$724,320.00	x	35 points	=	27.31

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: KSM Consulting, LLC

DATE: November 12, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
Numerical Score:		
Section II. Organization Qualifications and Experience (Max: 25 Points)	12.00	
Section III: Proposed Services (Max: 40 Points)	22.00	
Section IV. Cost Proposal (Max: 35 Points)	25.92	
TOTAL POINTS (Max: 100 Points)	59.92	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: KSM Consulting, LLC

DATE: November 12, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 12.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided related projects.• One project was for IV&V services.• IV&V experience is not specific to the programs and/or Federal entities associated to this project.• Projects focus more in implementation than that the IV&V component.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• Utilizing a subcontractor which has previously experience working with child support.
3. Organizational Chart
<ul style="list-style-type: none">• Total of 8 resources, staff of 2 for the duration of the project.
4. Litigation
<ul style="list-style-type: none">• None.
5. Financial Viability
<ul style="list-style-type: none">• Provided a Dun & Bradstreet report that shows a score that they are financially viable, however the financial statement pieces were redacted making it difficult to confirm their financial viability.• Bidder did not provide the 3 most recent years of Financial Statements.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: KSM Consulting, LLC

DATE: November 12, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 22.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Response was vague, team would have like to have seen more details.• Lacked experience with CMS IV&V requirements, no mention of MELC.• Indicates an understanding of IV&V processes as shown by the four guiding principles.• Provided an example of how to modify the approach based on the strength of the project manager.• Proposes to provide real-time guidance and actionable recommendations.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Response was vague, would like to have seen more details.• Planning: provided a list of artifacts which are expected to be review and verify. However, did not address how finding would be presented.• Design: Did not provide what artifacts would be deliver as a result of the design phases of the project.• Training: cost effectiveness, utilizing train-the-trainer, and recorded sessions.• No indication of who would be delivering the training.
C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Indicated specific responsibilities and availability of staff.• Did not address keeping data in the U.S.• Did not address the level of effort needed from the State team. Did provide what roles, but not expected FTE's.
D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Provided what components would be included in the PMP, but did not customize a PMP specific to this project as part of the RFP.
E. Reports
<ul style="list-style-type: none">• Agreed to provide reports.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Provided detailed date projections, but vague terminology.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: KSM Consulting, LLC

DATE: November 12, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 25.92

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$763,400.00	x	35 points	=	25.92

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Maximus US Services, Inc.

DATE: November 12, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
<u>Numerical Score:</u>		
Section II. Organization Qualifications and Experience (Max: 25 Points)	21.00	
Section III: Proposed Services (Max: 40 Points)	26.00	
Section IV. Cost Proposal (Max: 35 Points)	26.41	

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Maximus US Services, Inc.

DATE: November 12, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 21.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided relevant projects.• IV&V experience in 48 states.• Twelve integrated eligibility systems.• Eligibility experience since 1998.• Assisted Missouri with the development of 15 Advance Planning Document Updates (APDUs) to secure continued project funding and same for NJ with Implementation Advance Planning Documents (IAPDs), CMS-required IV&V attestations relative to integration with the Federally-Facilitated Exchange (FFE)/Federally-Facilitated Marketplace (FFM).• CMS-required Progress Reports, and CMS-required Medicaid Eligibility and Enrollment Toolkit (MEET) checklists (delivered for each Milestone Review) and CMS-required reporting consistent with the Medicaid Eligibility and Enrollment Life Cycle (MEELC).
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None.
3. Organizational Chart
<ul style="list-style-type: none">• Provided.
4. Litigation
<ul style="list-style-type: none">• Three employee related cases for discrimination and pay. The team has no concerns as it relates to this RFP.
5. Financial Viability
<ul style="list-style-type: none">• Appears financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Maximus US Services, Inc.

DATE: November 12, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 26.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Indicate they will bring their own comprehensive set of structured checklist.• Indicated they worked on the WIC Electronic Benefit Transfer (EBT) QA project, which should have been provided in Section II, Overview of Organization.• Under format & structure they indicated they will deliver the service, but did not define an approach.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Lacked details on how they will do the process, just that they agree to do it.• Proposes to utilize and create monthly evaluation steps.• Proposes 300 hours of the project budget in planning for a Trainer to examine the requirements, develop the training materials, and deliver the required training.• Provided a thorough list of federal agency standards.• Proposes to use the Analyze, Design, Develop, Implement, and Evaluate (ADDIE) instructional design.• Proposes to participate in design discussions and support system requirements validation without significantly altering the project schedule or budget.• Did not define the approach to delivery of information that would be available in testing.• Proposes webinar training with records, for reuse.
C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Provided organizational chart with specifics and participant experience.• Unclear as to the number of FTE's that are dedicated to the project.• Indicates they will comply with State & Federal guidelines on social distancing.• Did not indicate they would protect the Department's confidential data and not view/transmit offshore.• While they provided a list of SOM resource expectations, they didn't fully address how much time would be required and instead referred to the communication plan as a method to address these items.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Maximus US Services, Inc.

DATE: November 12, 2020

D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Minimally met, provided a high-level outline.• Proposes a method called the "Executive Flash Report" which is an immediate escalation of critical findings.• Proposes a comprehensive communication approach including informal day-to-day communication and then no surprises in formal documentation and correspondences.• Process and Document Reviews: utilizes the interview and deep dive approach.• Indicates that deliverables are passed through an internal review process before they are submitted in draft format to the State.• Recommends storing in the project repository and preference to SharePoint.• Included a comprehensive corrective action plan.
E. Reports
<ul style="list-style-type: none">• Met requirement.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Provided good visuals and goals.• Acknowledges to minimize disruption of staff time.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Maximus US Services, Inc.

DATE: November 12, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 26.41

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$749,180.01	x	35 points	=	26.41

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Public Consulting Group, Inc.

DATE: November 12, 2020

DEPARTMENT NAME: Health and Human Services

NAME OF RFP COORDINATOR: Tom Charette

NAMES OF EVALUATORS: Shannon Courtois, Jeff Farnsworth, Jamie Pruett

SUMMARY PAGE

Pass/Fail Criteria		
	Pass:	Fail:
◆		
	Points Awarded:	
Numerical Score:		
Section II. Organization Qualifications and Experience (Max: 25 Points)	17.00	
Section III: Proposed Services (Max: 40 Points)	26.00	
Section IV. Cost Proposal (Max: 35 Points)	35.00	
TOTAL POINTS (Max: 100 Points)		
78.00		

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Public Consulting Group, Inc.

DATE: November 12, 2020

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

Total Points Available: 25

Score: 17.00

Evaluation Team Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Two projects were IV&V related, the other one was an assessment for the future Child Welfare System implementation.• Past experience (since 2008 with DHHS) specifically with OFI in current Programs such as TANF, SNAP, and Medicaid, and ACES and Siebel.• Knowledge of Federal requirements based on being an IV&V vendor and past experience.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• Not utilizing.
3. Organizational Chart
<ul style="list-style-type: none">• Organizational chart included an individual that has prior OFI business process experience.
4. Litigation
<ul style="list-style-type: none">• Provided a lengthy list without settlement amounts.• Does not appear to affect the services they would be providing.
5. Financial Viability
<ul style="list-style-type: none">• Appear financially viable.
6. Certificate of Insurance
<ul style="list-style-type: none">• Valid.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Public Consulting Group, Inc.

DATE: November 12, 2020

EVALUATION OF SECTION III

Proposed Services

Total Points Available: 40

Score: 26.00

Evaluation Team Comments:

Part IV. Section III. Proposed Service (File #3)
1. Services to be Provided (Part II)
A. General Requirements (including Part IV, Section III.2.)
<ul style="list-style-type: none">• Will utilize the created IV&V Center of Excellence (CoE).• Will utilize a developed proprietary Training and Certification program.• Proposes to utilize software tools, guides, and checklists to assess the technical processes and components of IT systems.• Proposes a methodology that includes a structured "how-to" approach, which prescribes the steps necessary to perform assessments.• Did not explain familiarity with CMS/FNS federal requirements and/or which would be applicable to this project.• Recognizes several specific risks to the project known from past experience.
B. IV&V Service Requirements of the IOS Modernization Project 1-5 (including Part IV, Section III.3. a-e)
<ul style="list-style-type: none">• Provided a lot of good information, however it doesn't seem to meet the criteria of "explain how recommendations will be identified and presented by the Bidder".• Did not state what artifacts would be produced as a result of the evaluations.• Did not address the deployment certification process or abiding by OIT's policies.• Proposes to develop a training plan in addition to the actual training.• Did not describe the critical training elements as required by the RFP.• Recognizes the need to know and react to IV&V findings as soon as they as identified and logged.
C. Staffing (including Part IV, Section III.4. a-e)
<ul style="list-style-type: none">• Staffing model was complete with experienced leads and relevant resumes.• Proposed to fully support a work from home model and will work collaboratively in the event where in-person support is required.• Did not address to the requirement of confidential data remaining in the Continental U.S.
D. Deliverables (Including Part IV, Section III.5 Management Plan)
<ul style="list-style-type: none">• Management plan was accurate and already customized to some degree for this project.
E. Reports

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Public Consulting Group, Inc.

DATE: November 12, 2020

<ul style="list-style-type: none">• Met requirement.
6. Implementation (Part IV, Section III.6)
<ul style="list-style-type: none">• Proposes to use interviews and collaboration to interact with the Department's Project Team.• Integrated eligibility subject matter expert is only expected to have a duration of 41 total hours for the project.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validations and Verification (IV&V)

BIDDER: Public Consulting Group, Inc.

DATE: November 12, 2020

**EVALUATION OF SECTION IV
Cost Proposal
Price: Comparison with Lowest Bid**

Total Points Available: 35

Score: 35.00

Lowest submitted Cost Proposal	÷	Cost Proposal being scored	x	Score Weight	=	Score
\$565,280.00	÷	\$565,280.00	x	35 points	=	35.00

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Berry, Dunn, McNeil & Parker

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• I – IV & V is a core service of BerryDunn• I – Does not sell or develop hardware or software• P – Over 25 years of IV & V services with HHS agencies• I – Current IV & V vendor with OCFS for CCWIS implementation and previous IV & V vendor for MMIS implementation.• I – 200 staff in Governmental Consulting Group• I – Headquartered in Portland, Office in Bangor• I – Outcomes-Based Certification (OBC) experience• P – Previous and current experience collaborating with Deloitte• I – Provided 3 similar projects within last 5 years
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• I – 1 subcontractor – Used to work for BerryDunn
3. Organizational Chart
<ul style="list-style-type: none">• I – Provided – Staff of 9
4. Litigation
<ul style="list-style-type: none">• I – 2 cases provided
5. Financial Viability
<ul style="list-style-type: none">• I – Not required to have audited financial statements; provided history of revenue, condensed financial statements, and Letter of Good Standing from TD Bank
6. Certificate of Insurance
<ul style="list-style-type: none">• I – Provided – Expires 1/01/21

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Berry, Dunn, McNeil & Parker

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none"> • I – IV & V approach – Plan, Review, Assess, Report
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none"> • I – IV & V Center of Excellence (COE) • I – Project Management Plan – Outlines how IV & V methodology will be tailored to specific requirements, expectations, and unique organizational environment of the IOS modernization project.
C. Staffing
<ul style="list-style-type: none"> • Subcontractor will be Senior IV & V Analyst/Technical Lead
D. Deliverables
<ul style="list-style-type: none"> • I – Establish a baseline to measure against
E. Reports
<ul style="list-style-type: none"> • I - Acknowledges monthly and quarterly reports
2. General Requirements (Part II, A.)
<ul style="list-style-type: none"> • I - IV & V team – Monthly meeting with steering committee • I - Regularly scheduled meetings & reports • I – validate technical and functional processes, iteratively. • I – Prospective validation activities • I – Monitor against KPI (existing to be provided by OFI) and SLA • I – Project Management institutes PMBOK • I – Do not plan having people on site, initially, due to COVID outbreak
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none"> • I – Foundational roadmap • P – Will provide timely, meaningful, and actionable recommendations • I – KnowledgeLink – Customized version of SharePoint • I - Report Production Cycle: Fact finding & Analysis, Internal Team Meetings, Report Production & Delivery, Discuss Findings with Project Team • I – Risk Management Plan proposed • I – RACI Matrix utilized to develop communication plan • •
4. Staffing

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Berry, Dunn, McNeil & Parker

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none">• I – Provided staffing chart, including subcontractor – Total 7 FTEs• I - Propose using Barry Dunn equipment, 3 workstations
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• I – Provided – Repeat information of bid responses
6. Implementation
<ul style="list-style-type: none">• I – Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Berry Dunn McNeil and Parker, LLC

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• P- Germane experience, Ohio Medicaid, Missouri Eligibility Determination, Maine OCFS• P- Extensive local presence
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• Q- Single person listed as Sub/Consultant
3. Organizational Chart
<ul style="list-style-type: none">• Included
4. Litigation
<ul style="list-style-type: none">• Nothing noteworthy
5. Financial Viability
<ul style="list-style-type: none">• P- Steady annual revenue growth/ Letter of good stand 24 years, TD Bank
6. Certificate of Insurance
<ul style="list-style-type: none">• Included, satisfactory

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Berry Dunn McNeil and Parker, LLC

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• P- Extensive experience, Federal and State compliance and confidentiality
B. IV&V Service Requirements of the IOS Modernization Project
• P- Services Approach plan
C. Staffing
• P- acceptable
D. Deliverables
• P- comprehensive, detailed, good follow-up
E. Reports
• Acceptable
2. General Requirements (Part II, A.)
• I- Covid19 plan outlined
• Q- Several subs/consultants listed under "Technical and Functional Processes" not mentioned in Part IV Section II (above)
• P- KPI and best practice outline.
3. IV&V Service Requirements of the IOS Modernization Project
• P- Comprehensive deliverables, risk management, scope, training, reporting and integration
4. Staffing
• Acceptable
5. Management Plan (Part II.D.1.)
• P- Well detailed and robust
6. Implementation
• P- Detailed rollout with specific milestones

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: BerryDunn

DATE: 10/30/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 includes the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• All the below are associated to File 2 cover letter:• P - Experience in IV&V work for Ohio Medicaid and Missouri E&E and Kentucky Tax system• Qualifications and Experience Form:• P - Portland Maine Company.• P – Established in 1974 and has experienced growth. 200 of the 500 in the Government Consulting Group.• P – history of IV&V services for Maine; CCWIS (July 2020) and 2008-2012 MMIS.• Q – can we get references to the above, validate work?• P – Pg. 7 Experience in working with many State and quasi-state entities.• P – Pg. 8 Areas of specialization and expertise.• P – Pg. 8 Provided examples where they helped with the project; most applicable is the Ohio ODM (Medicaid 2016-present) helping with CMS MELC checklists, certification processes and assessments and the SOM MMIS in 2008-2012 (same requirements). R1. R2, R3 reviews for Ohio (pg.10)• P – Pg. 10 True IV&V – they don't develop or sell software.• N – sense of redundancy at this point, lots of sections say the same thing in different ways.• P - Project 1 pg. 12 ODM, again applicable in regard to CMS requirements on forms, assessments, reporting and monitoring.• P - Project 2 pg. 13 Missouri (2013) applicable as it's an E&E system with focus on automation and electronic verification.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: BerryDunn

DATE: 10/30/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• P – Project 3 pg.15 West Virginia (2017) applicable and also interesting (from a project standpoint) that this system will include not only the integration of MC/SNAP/TANF but also integrates CCSP/Child and Adult protective and Child Support and enforcement. Required coordination, monitoring and reporting to CMS, FNS and ACF.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• I – one listed - Kristan Drzewiecki, MP, PMP• N – more on this on Pg.13 of File 3. Why not consolidated?
3. Organizational Chart
<ul style="list-style-type: none">• I – 2 Executive, 1 PM, Tech lead (consultant) and Project coordinator, 4 total SME's: Functional, Technical, Testing, Training. Seems like a large team based on OFI's experience with IV&V.• Q – availability during contract has specific end dates for December 31, 2021, what about renewal period?
4. Litigation
<ul style="list-style-type: none">• I - Pg. 23 - 2 listed.
5. Financial Viability
<ul style="list-style-type: none">• N – Did not provide the three (3) most recent years of Financial Statements audited or reviewed by a Certified Public Accountant, for reason of "not required"
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided the requirement – no further comment.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: BerryDunn

DATE: 10/30/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
All notes prior to General Requirements section: P – Pg.11 5 principles/Center of Excellence (CoE) I – Brenda Harvey quote.
A. General Requirements
<ul style="list-style-type: none">• For clarity: RFP requirements that were on Pg.16, not the section on pg.8 (Part II).• Pg.14 - Approach includes building relationships, monthly executive meetings, reports and agreed upon communication methods.• N – Pg.15 Communication approach provided in Section 4.a (Did a find and couldn't locate Section 4.a, did find a Section III 4.a on pg. 62, communication plan in Attachment 10, this is actually in the PMP, attachment 10 pg 132)• N- Didn't follow format review as their proposal now jumps to Part II, A General requirements, those notes are below.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• N – Bidder merged RFP requirements pg. 16, and pg.8 (Part II)• P – Pg.26 shows Table 1 examples of they would assess if project planning deliverables are enough.• I - Design Pg.30 – worked with Deloitte previously on agile projects.• I – Design review - full immersion into design sessions.• P – Pg.37 – Testing section and time travel technology.• Training Pg.38 – brings the ADDIE approach.• Updates, assessments and recommendations: repetitive language.
C. Staffing
<ul style="list-style-type: none">• N – had to search, moved the deliverable section prior to staffing starts on pg.62 in the view or pg. 55 from the bid.• I – discusses communication plan and pg. 63 or 56 and provides a figure on high-level approach and a RACI.• Staffing Model – refer also to organizational chart and attachment 7 and 8.• N – also refers to subcontractors in this section pg. 69 or 62• Q – they need 3 workstations/office cubes even though they state they can remote work and no laptops even though they may need to access SOM network.• P – will be respectful of staff's time and make arrangements with leadership if desired

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

D. Deliverables
<ul style="list-style-type: none">• For clarity: RFP requirements on pg. 16.• P- deliverable review checklist.• I – offered Knowledge link for documentation repository.
E. Reports
<ul style="list-style-type: none">• For clarity, RFP requirements on pg.10• I – offered to provide reports directly to CMS.• P – Pg.54 many or unauthorized project participants receive IV&V feedback, they may make decisions to respond to them in a way that contradicts other activities in the project• N – this section discusses a lot about risk, but should be in Section D, Management Plan.
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• Pg.15 Met A.1• I – Pg.15 cited, “Department, Deloitte Consulting, NTT Data, Knowledge Services, and other project vendors . . .” How do they know this is the project team? Didn’t list IT?• I – A.1.a - Pg. 15 prospective, concurrent, and retrospective validation reviews• I – A.1.a – Pg. 15 revalidate the technical and functional processes to help ensure their repeatability• P – A.1.a – Pg.17 communicate identified compliance gaps or potential compliance gaps to the Department along with actionable recommendations on how to resolve• A.1.b – Met, lots of “will work with” and offered Project Management Institute’s PMBOK and KPI’s• N - they will request existing KPIs from the Department, instead of helping to develop them based on previous project experience.• P - A.1.c They reviewed Deloitte’s response to RFP# 201912213, estimated the number of artifacts expected to review, and aligned the cost proposal• P – A.1.d The BerryDunn IV&V project team will facilitate• P – A.1.d defining IV&V team's role.• P- A.1.e document on-site schedule and provide this to the Department monthly, won’t do so until mutually agreed and currently utilizing Zoom and MS Teams.• P - A.2 meaningful and actionable recommendations
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• B.1.a – met. For this section Bidder merged RFP requirements pg. 16, and pg.8 (Part II)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: BerryDunn

DATE: 10/30/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• B.2 – met. Bidder merged RFP requirements pg. 16, and pg.8 (Part II)• B.3 – met. Bidder merged RFP requirements pg. 16, and pg.8 (Part II)• B.4 – met. Bidder merged RFP requirements pg. 16, and pg.9 (Part II)• N - Pg. 38, focus seems to be on deployment training only.• P – video based trainings.• B.5 - met Bidder merged RFP requirements pg. 16, and pg.9 (Part II)
4. Staffing
<ul style="list-style-type: none">• Met - Bidder merged RFP requirements pg. 16, and pg.9 (Part II)
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• Bidder merged this section with RFP requirements from pg.17• N – indicates the Management plan is Attachment 11 pg. 156 or 113, but this is really the implementation plan. Then states they will build it out in accordance to the schedule. This is actually, Attachment 10, and lots of the same stuff is repeated.
6. Implementation
<ul style="list-style-type: none">• References Attachment 11 – the Implementation work plan, this meets outlined requirements.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti Technologies, Limited

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• I – Largest Independent Testing Company• I – 22 years in business• I – Provided services across many industries• I – Intellectual Property – BlueSwan• I – Recipient of analyst recognition and awards• I – Provided 3 project examples
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• N- Provided – Not clear on number of FTEs to be on project – 2 onsite
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• N – Embedded pdf link did not open• I – Found statements online – Amounts in Lakhs of Indian Rupees – Appear viable
6. Certificate of Insurance
<ul style="list-style-type: none">• N – Embedded pdf link did not open

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti Technologies, Limited

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none">• I – Included detailed chart of IOS develop lifecycle w/ planned deliverables• I - Implement governance and communication structure• I – Clarity, Consistency, Completeness, and Testability• I – Train-the-trainer approach
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• No response found
C. Staffing
<ul style="list-style-type: none">• I – Two consultants on-site
D. Deliverables
<ul style="list-style-type: none">• No response found
E. Reports
<ul style="list-style-type: none">• I – Indicated reports would be provided
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• No specific response found
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• No specific response found
4. Staffing
<ul style="list-style-type: none">• I – Two consultants on-site• I – Addressed workstation/equipment needs
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• N – Included outline of structure of management plan without any content
6. Implementation
<ul style="list-style-type: none">• N – Included roadmap without detail of dates

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti Technologies

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• P- Global and far-reaching – vast resources• P- Impressive project list• N- Lack of DHHS industry-specific experience
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• N- Vague- “pool of testing experts”
3. Organizational Chart
<ul style="list-style-type: none">• N- Seems general purpose. Also “Delivery Manager Offshore”
4. Litigation
<ul style="list-style-type: none">• N- “...Cigniti didn't underwent any litigation”?
5. Financial Viability
<ul style="list-style-type: none">• P- Steady and impressive growth
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided and acceptable

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti Technologies

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• Workable model
B. IV&V Service Requirements of the IOS Modernization Project
• Workable but somewhat generic.
• P- Strong training section
C. Staffing
• N- Generic.
D. Deliverables
• Acceptable
E. Reports
• N- Lacks detail
2. General Requirements (Part II, A.)
• Acceptable
3. IV&V Service Requirements of the IOS Modernization Project
• Somewhat generic, but again strong training section
4. Staffing
• N- Generic. Delivery Manager Offshore
5. Management Plan (Part II.D.1.)
• P- Sensible and clear
6. Implementation
• Fine, but generic

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti

DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 includes the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• Qualifications and Experience Form:• I – Independent Testing Company and developer of Blue Swan (QE (engineering) and QA tools).• I - #1 in North America for software testing.• I – Key role for them seems to be testing and QA focus, and a lot of recognition in this area only.• N – Spelling error? Artefact = artifact? This is throughout the entire document.• N – all projects provided focused solely on testing and while multiple forms of testing processes were included, and their associated tools, this is not a testing RFP.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None being utilized.
3. Organizational Chart
<ul style="list-style-type: none">• N – Offering 2 onsite core resources, and then an offshore delivery manager to the “Flex Team”. This model would likely work for some automated testing purposes, but not for IV&V.
4. Litigation
<ul style="list-style-type: none">• N – Grammar in RFP: “Since its inception Cigniti didn’t underwent . . .”• P – there isn’t any litigation.
5. Financial Viability
<ul style="list-style-type: none">• Provided statements, but as PDF’s, didn’t seem to include them within file 2.• Also provided certifications, but as PDF’s, didn’t seem to include them within file 2.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti

DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

6. Certificate of Insurance
<ul style="list-style-type: none">• Provided but as PDF, didn't include within file 2.

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
For clarity, Services to be provided is on Pg. 16 of the RFP, and in Section III, not Part II. <ul style="list-style-type: none">• N – Main approach is “to work with” the project team to identify deliverables to be reviewed, they didn’t specify which deliverables they feel an IV&V should specifically review.• N – Pg.4 1.2 - Grammar “. . .support them embark . . .”• N – didn’t follow RFP format; didn’t embed the RFP ask in with the answer.
A. General Requirements
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N – Response not adequate to prove any experience with working with the Federal partners.• N – Response not adequate to prove any experience with Federal policies and practices required for this project.• N -strategy is basically to deploy an account manager.• N – Steering Committee will meet on a regular basis but doesn’t provide any specific frequency (as the Executive meets quarterly.)• N – Did not state how they would verify and validate.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• P – Pg.8 – chart is adequate to capture the process/deliverables to be reviewed at specific stages, meets the Planning requirement for this section.• N – Pg.9 – Design section not fully addressed. Indicates what they will review, but not what they plan to produce as an artifact as part of that review.• N – Pg.9 spelling – verity = verify• N – Pg.9 Testing section – the chart is adequate on what they will review, but again, doesn’t meet all requirements of this section on how they plan to ensure specific activities are met• N – Pg.10 Training – they don’t meet the requirement. They indicate they will review, and they provide some training options, but don’t specifically state they understand they will be required to deliver the training.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Cigniti

DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• N – Pg.11 Updates/Assessments – doesn't indicate the RFP requirement of daily communications.
C. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – doesn't indicate their understanding of what can be shared off-shore or not.• N – neither of the two leads resume's demonstrate any experience with this project's specific components. Nothing related to Medicaid, TANF or SNAP and working within those programs and/or the Federal partners associated to them. Very tech specific.• Other concerns addressed already within the Section 3. Organizational Chart.
D. Deliverables
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – Management Plan PDF link is a templated structure only, without and thought to this specific project.• N – Pg. 14 Grammar build = built
E. Reports
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 10 requirements, not pg. 16 (Part,II)
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – no additional information provided outside of what was addressed already.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – did not provide critical elements they would look for.• N – no additional information provided outside of what was addressed already.
4. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – did not address their expectations on how many FTE's are needed from the State.• N – no additional information provided outside of what was addressed already.
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – barely meets, this is a template, not a project specific high-level plan.
6. Implementation
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• P – Chart on Pg.14 is clear and concise.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

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DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- | |
|---|
| <ul style="list-style-type: none">• N - they only provided a chart to address this entire section, no dependencies specifically listed. |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: CSG Government Solutions

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• P – 20 years – focus on public sector, large-scale system implementations• I – Previous IV & V vendor for BRE implementation and FedCap evaluation• P – Experience with Deloitte's IES solution• I – "IV & V by CSG" methodology and "TeamCSG" – trademarked tools• I – Forbes Award Recipient for last 3 years• I – CSG Center of Excellence (COE)• I – Provided 3 relevant examples
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• I – Provided – 3 key staff, 4 support staff (advisors)
4. Litigation
<ul style="list-style-type: none">• I – Provided
5. Financial Viability
<ul style="list-style-type: none">• I – Included – No concerns noted
6. Certificate of Insurance
<ul style="list-style-type: none">• I – Included – Exp 5/28/21

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: CSG Government Solutions

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none">• P – Prior knowledge of ACES & Deloitte’s Integrated Eligibility System (IES)• I – Awareness of other projects and impact to/from IOS project• I – Acknowledges importance of participant experience• I – Requirements Traceability Matrix• I – Addresses each requirement in this section
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I – Proactive & Predictive event management• I – Provided chart of project critical success factors
C. Staffing
<ul style="list-style-type: none">• I – Proposed team has extensive experience with HHS programs and prior knowledge/experience with Maine DHHS
D. Deliverables
<ul style="list-style-type: none">• I – Did not see clear response in this section – addressed in #5
E. Reports
<ul style="list-style-type: none">• N – Did not see this addressed in this section of response – acknowledged in next section
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• I – Value of CSG’s Independence• I – Focus on Product, Process, and Progress• I – Risk Assessment model containing 400 potential risks
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I – Roadmap provided for proposed services• I – Detailed approaches presented for each component
4. Staffing
<ul style="list-style-type: none">• I – Project advisors are included at no cost• I – 2 workstations and Network Access
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• I – Included thorough plan
6. Implementation
<ul style="list-style-type: none">• I - Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: CSG Government Solutions

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
• P- Extensive Public Sector experience including Medicaid/Eligibility and ACES-specific
2. Subcontractors and/or Consultants
• None
3. Organizational Chart
• Provided – specific and satisfactory
4. Litigation
• Nothing of note
5. Financial Viability
• Satisfactory
6. Certificate of Insurance
• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: CSG Government Solutions

DATE: 11/04/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• P- Focused, extensive and clear. ACES experience
B. IV&V Service Requirements of the IOS Modernization Project
• Acceptable
C. Staffing
• Acceptable, though individual qualifications getting repetitive
D. Deliverables
• Acceptable
E. Reports
• Complete and reasonably specific
2. General Requirements (Part II, A.)
• Meets our needs
3. IV&V Service Requirements of the IOS Modernization Project
• P- Organized and complete – good use of modeling and testing
4. Staffing
• Acceptable
5. Management Plan (Part II.D.1.)
• P- Well organized
6. Implementation
• Planning acceptable – graphic would have been better

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: CSG

DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 3 total pages; the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• File 2:• P - Experience with CMS - experience with CMS' requirements for eligibility modernization, MEELC and MECL, Outcomes-based Certification, Standards and Conditions for Medicaid IT, MITA 3.0<ul style="list-style-type: none">○ P - Completed IV&V assessments in 46 states○ P – 52 IV&V specific projects, 14 active currently.○ P – 67 Medicaid/Eligibility specific projects.• P – Experience working specially with OFI on the BRE project, and already knowledgeable of current working infrastructure which is utilized in this project.• P – proposed team is already familiar with the solution Deloitte is delivering.• P – utilizes “Proven IV&V by CSG” and TeamCSG tools (cloud-based collaboration platform)• P – Center of Excellence (CoE) teams• P – Project boot camp – onboarding program for specific projects.• P - CSG Realize – library of resources to utilize.• P – chart on page 6, all projects previously completed are applicable to this one.• P – didn't use Maine as a reference project specifically.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• P – not utilizing
3. Organizational Chart
<ul style="list-style-type: none">• 1 Executive, three key: PM, Tech and Training, 3 support staff in applicable areas.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: CSG

DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

4. Litigation
• P – disclosed and only a defendant in 1 lawsuit.
5. Financial Viability
• Provided
6. Certificate of Insurance
• Provided

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
For clarity, Services to be provided is on Pg. 16 of the RFP, and in Section III, not Part II. P – liked the book-mark formatting for easier review. P – liked the statement on “supportive while not consuming an excess of valuable Department and vendor staff time”
A. General Requirements
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• Starts on Pg.20• P – they will develop a PMP, specifically designed for IOS. Refers to Attachment 10 which also serves as the Management Plan, a further requirement. Consolidates deliverables.• P – ensure they will meet the Federal requirements, specifically stating, “These requirements may have different nuances from each federal agency involved (CMS, FNS or ACF). Typically they will include 508 compliance standards . . .”• P - assess the solution from both the user experience and the technical processing behind the scenes• P – application of lessons learned instead of just documenting them.• P – Risk management is central to their goal and incorporates real-life experiences.• P – Developed checklist process for review and monitoring of deliverables, and the quality of the deliverable.• P – Communication approach: Interviews and then create approach for each stakeholder.• I - data element should only need to be entered once for a truly integrated solution and optimal end user experience.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• P – Project Health dashboard.• P – observations made by team are vetted/verified and criticality to the project is assessed and delivered in an informal manner to leadership initially.• P - Frequency of communication is flexible pending the issue and criticality of it.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N – Went off format: merged this section with section below.• P – Pg.31 - provided a sample planning exercise statement and recommendation.• P – Will utilize their Risk Assessment Model (RAM)• P – deliverable artifact will be a dashboard view.• See below for additional test information.• P - Blooms Hierarchy of Learning, encourages application of training.• P – Dedicated training lead and will use surveys to gauge.• P – Has training resources within the TeamCSG, and in particular will utilize a DED, a deliverable expectations document.
C. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• See below for more information.• I – no mention of the pandemic but did indicate on pg.81 that “If needed, CSG may request access if conducting work off-site (which would be within the United States)”
D. Deliverables
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• P – Attachment 10 PMP has already been customized to some degree for this specific project, and has more sections that requested.
E. Reports
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 10 requirements, not pg. 16 (Part,II)• Meets, and these items are sprinkled throughout their proposal.
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• I – Pg.11 - they embedded these as part of the overall General requirements as the starting point for further general requirement responses. While they didn't follow the specific structure, this was much easier to follow along and read.• P – main goal is to bring value and utilize the “Foundational Principles” to achieve the goal.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 11/2/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• P – adheres to industry best practices and standards.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – Went off format: merged this section with only Part II, B.1.a: Planning• P- Pg. 29 - Bulleted list of 7 distinct exercises they plan to conduct as part of planning for the assessment.• P – Pg.32, more than just review; they evaluate and analysis and compare to requirements and to the RTM.• P – leverage experiences from other states.• P - Testing Pg.35 – provided a list of critical elements they will look for such as acceptance testing activities, test scripts, defect triage management, regression, test environments, data and procedures.• P – will share information timely to help course correct.• P - Training Pg.39 – recommends Train the Trainer approach for cost effectiveness, and self-service videos.• P – on reporting of assessments, in addition to the standard stuff, detail information on risks, meetings attended, project highlights, observations, areas of concern, and actionable recommendations for the State to consider, they added trending.
4. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• P – Pg.52 approach is to utilize augmented staff and CSG Project Advisors are provided at no additional cost to the State• Refers to Attachment 8 for specific staff.• P – Pg.57 – bulleted list of expectations of the Department is clear and actionable.
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• To meet this requirement, they must submit a high-level plan, which is Attachment 10. All other specific requirements are listed above in Deliverables.
6. Implementation
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• P – Pg.60 table to show stages, activities and responsible individuals.• All deliverables provided.• Refers to Attachment 11, Implementation Work Plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM Consulting

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• I – Project Management Professionals• I – Provided 3 projects, 1 is for IV & V services
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• I – One proposed – Experience in Maine – Advantage says last paid in 2009
3. Organizational Chart
<ul style="list-style-type: none">• I – Provided, shows 2 resources from subcontractor
4. Litigation
<ul style="list-style-type: none">• None
5. Financial Viability
<ul style="list-style-type: none">• N – Did not provide financial statements. Provided D & B report with financial statements section redacted.• I – D & B indicates they are viable.
6. Certificate of Insurance
<ul style="list-style-type: none">• I - Provided, Exp 04/29/01

**STATE OF MAINE
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RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM Consulting

DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none"> • I – IV & V Framework – Initiate, Engage, Close • I – Project Health Assessment tool • I – “facilitates key stakeholder buy-in”? • I – Will work to ensure healthy transition from MMC
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none"> • I – Attend key meetings, copied on all emails • I – Change request plan • I – RACI chart for design w/ working groups • I – Requirements Traceability Matrix • I – Testing environment mimics production environment • I – Develop electronic training modules • I – Reports to use Maine template, if available. Draft within 3 business days, Final report by 15th.
C. Staffing
<ul style="list-style-type: none"> • I – Equipped to work remote, if needed. • I – 2 subcontracted resources embedded in project team • I – 1 workstation per staff, own equipment
D. Deliverables
<ul style="list-style-type: none"> • Management plan provided
E. Reports
<ul style="list-style-type: none"> • I - Acknowledged
2. General Requirements (Part II, A.)
<ul style="list-style-type: none"> • I – Acknowledged adherence to FNS & CMS guidelines
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none"> • I – Addressed in response above
4. Staffing
<ul style="list-style-type: none"> • I – 3 tier model proposed, 1st tier dedicated, 2nd as needed, 3rd training & change management • Less than 2 FTEs dedicated for duration of project
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none"> • I – High level plan included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

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DATE: 11/05/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

<ul style="list-style-type: none">• I – Use of their PHA tool• I – Mutually agreed upon repository to reside on State Network
6. Implementation
<ul style="list-style-type: none">• I - Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM

DATE: 11/06/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
• Acceptable
2. Subcontractors and/or Consultants
• Covered, qualified
3. Organizational Chart
• Provided, acceptable
4. Litigation
• None
5. Financial Viability
• Verified, Dun and Bradstreet
6. Certificate of Insurance
• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM

DATE: 11/06/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• Acceptable, if a little hard to follow
B. IV&V Service Requirements of the IOS Modernization Project
• Provided
C. Staffing
• Provided
D. Deliverables
• Provided
E. Reports
• Provided
2. General Requirements (Part II, A.)
• Seems passive- "will participate in key meetings" "will request access to project communication"
3. IV&V Service Requirements of the IOS Modernization Project
• N- Passive again: Comm plan: "We will accomplish this in large part by attending and participating in key meetings and being copied on all communications between entities, as an embedded part of the team."
4. Staffing
• Provided, acceptable, complete- Specific responsibilities provided as well as availability
5. Management Plan (Part II.D.1.)
• Gantt chart provided. State Document Repository preferred
6. Implementation
• Provided- Very detailed date projections, but vague terminology

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM

DATE: 11/3/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 3 total pages; the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• File 2:• N – while they have IV&V experience, none of it is specific to the programs and/or Federal entities associated to this project. They did do a modernization in Indiana and Mass. for an E&E system and/or Medicaid but not the IV&V.• N – On the Mass. Medicaid system, they didn't specifically mention any work directly related to CMS and/or the CMS System Modernization requirements.• P – they do have some experience working on E&E systems that determine the eligibility for TANF, SNAP and Medicaid.• N – Projects focus more in implementation than that the IV&V component.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• I – Subcontractor Thomas Kelliher worked for Division of Child Support to deliver a report on Random Moment Sample Strategy – check with Jerry?
3. Organizational Chart
<ul style="list-style-type: none">• I – staff of 8 dedicated to the project with escalation to VP, P, and CEO.
4. Litigation
<ul style="list-style-type: none">• P - None
5. Financial Viability
<ul style="list-style-type: none">• Q – did they meet this? Some data seems redacted and I'm not sure I saw 3 full years?
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM

DATE: 11/3/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
For clarity, Services to be provided is on Pg. 16 of the RFP, and in Section III, not Part II.
P – Pg.4, the 4 guiding principals indicate understanding of IV&V processes. P – Pg.5, the example of how they would modify their approach based on the strength of the PM.
A. General Requirements
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N – did not follow format and include the RFP specific ask and then answer. Had to dig for these specific requirements. They only included the main section General Requirements below.• N – lacks experience with CMS specific requirements, only listed Federal requirements of FEDRAMP, HITECH, MARS-E2.0. No mention of MELC or MITA that are CMS specific.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N – didn't follow format and all comments regarding this section are listed below.• Pg.16 – said they would meet the planning requirement.• N - Design – they didn't provide what artifacts they would deliver as a result of attending the design phases of the project.• Testing – met the requirement• N – Training – doesn't address the bidder's responsibility toward delivery.
C. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – didn't follow format and all comments regarding this section are listed below.• N – didn't really address requirements for keeping data in the US.
D. Deliverables
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – didn't follow format and all comments regarding this section are listed below.• N –While they provided what components would be included in the PMP, they did not customize a PMP specific to this project as part of the RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: KSM

DATE: 11/3/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• Meets expectations on the document archive.
E. Reports
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 10 requirements, not pg. 16 (Part,II)• N – didn't follow format and specifically address this section, met the requirements by sprinkling in the report terminology throughout the proposal.
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• P – will provide real-time guidance and actionable recommendations.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – Planning section, Pg.16, while they provided a list of artifacts they are expecting to review and verify, they didn't address how they would present their findings.• Design, Testing and reporting Portion – met the requirements• P – Training Pg.21 looking for an online learning management system.• P – cost effectiveness, utilizing train-the-trainer, and recorded sessions.• I – in the Implementation plan, they indicate the "Change Management" is responsible for training, they don't state if that is them or SOM resources.
4. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• Staffing Model – Attachment 7, proposing mostly remote work for entire team.• N – didn't really address the LOE needed from the State team, provided what roles, but not expected FTE's.
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• Mgmt Plan = Attachment 10• Met this high-level requirement.
6. Implementation
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• Provided just the plan in this section.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus US Consulting

DATE: 11/10/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• I – 45 years in business, 32 years' experience with IV & V• I – 12 IE systems and 90 additional government program projects• I – Was involved with selection of ACES DDI vendor• I – Experience working with Deloitte• I – Experience with DHHS/OFI programs• I – 3 relevant projects provided
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• I – Project Modernization Consulting (PMC) Practice• I - Provided
4. Litigation
<ul style="list-style-type: none">• I – Disclosed – Related to discrimination and employee pay
5. Financial Viability
<ul style="list-style-type: none">• I – Provided – No concerns with viability
6. Certificate of Insurance
<ul style="list-style-type: none">• I – Provided Exp 5/1/21

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus US Consulting

DATE: 11/10/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none">• Q – IV & V experience in Maine? A. Current provider of QA services for EWIC• I – Proactive IV & V contractor• I – Largest E & E Services operator in US• I – Methodology is flexible to meet client needs•
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I - Methodology designed to eliminate subjectivity• I – Thorough list of Fed agency standards
C. Staffing
<ul style="list-style-type: none">• I – Prepared to work remotely
D. Deliverables
<ul style="list-style-type: none">• I – SharePoint for document repository is preference – Hosted remotely
E. Reports
<ul style="list-style-type: none">• I - Acknowledged
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• I – Reference to ESCs? Not sure what that is.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I – Included through lists of items to be included for the 5 sub items
4. Staffing
<ul style="list-style-type: none">• I – Two workstations and their own equipment• I – Acknowledges needing state assistance, but not to what level• I – Unclear of FTEs dedicated to project
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• I – High level plan included• I – Executive Flash Report to escalate critical items
6. Implementation
<ul style="list-style-type: none">• I – Corrective Action Plan detail included• I – Work plan included• I – Minimize disruption to state staff

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus US Services

DATE: 11/12/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• Provided- 30 years public sector experience, specific to Eligibility since 1998• 32 years IV&V experience for most states including Maine• ACES-specific experience• Robust experience
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None listed
3. Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation
<ul style="list-style-type: none">• Some pending, nothing egregious
5. Financial Viability
<ul style="list-style-type: none">• Steady revenue growth
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus US Services

DATE: 11/12/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• Proven methodologies, meets requirements
B. IV&V Service Requirements of the IOS Modernization Project
• Meets
C. Staffing
• Provided
D. Deliverables
• Meets, and included specifics with federal requirements incorporated
E. Reports
• Acceptable
2. General Requirements (Part II, A.)
• Detailed, focused approach, clear visuals
3. IV&V Service Requirements of the IOS Modernization Project
• "Rolling Wave" approach to Agile design "where development iterations build on work completed in previous iterations" 90 day focus and review
4. Staffing
• Reiterates Org chart, with a good level of specifics and participant experience
5. Management Plan (Part II.D.1.)
• Detailed and clear
6. Implementation
• Provided, good visuals and goals

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus

DATE: 11/5/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Facilitator for this RFP.*

Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 7 total pages that included the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• File 2:• I – 157 total pages on the overview of the organization!• P – IV&V vendor for 48 states and 12 IE system projects (including our current contracts in Arkansas, North Carolina, Ohio, Oklahoma, and Utah)• P – Experience with MMIS, and EBT.• P – was the vendor who provided Project Management support for ACEs team. They called it DDI.• I - assisted Missouri with the development of 15 Advance Planning Document Updates (APDUs) to secure continued project funding and same for NJ with Implementation Advance Planning Documents (IAPDs), CMS-required IV&V attestations relative to integration with the Federally-Facilitated Exchange (FFE)/Federally-Facilitated Marketplace (FFM)• P – For North Carolina: CMS-required Progress Reports, and CMS-required Medicaid Eligibility and Enrollment Toolkit (MEET) checklists (delivered for each Milestone Review) and CMS-required reporting consistent with the Medicaid Eligibility and Enrollment Life Cycle (MEELC)
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• P - Not utilizing
3. Organizational Chart
<ul style="list-style-type: none">• I – the chart on pg.28, embedded within the overall company structure.
4. Litigation
<ul style="list-style-type: none">• N – 3 that seem to be mostly employee related.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Maximus

DATE: 11/5/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

5. Financial Viability
• I – incredibly large section and concerned most of it is just filler?
6. Certificate of Insurance
• I – over-provided?

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
For clarity, Services to be provided is on Pg. 16 of the RFP, and in Section III, not Part II. N – strong dislike for their organization of the proposal, including that some, not all, of the bookmarks didn't work.
A. General Requirements
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• I – They worked on the WIC Electronic Benefit Transfer (EBT) QA project, why was this not in File 2?• P - brings our own comprehensive set of structured checklists• N – couldn't specifically find the format & structure they will deliver the services under but did see a lot of "will work with".• Feel overall they met this, but the format makes it incredibly hard to pick out specific positives for this section.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• I - 300 hours in project budget in planning for a Trainer to examine the requirements, develop the training materials, and deliver the required training• I - Maximus uses the Analyze, Design, Develop, Implement, and Evaluate Instructional Design (ADDIE)
C. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• See Comments in other section to merge.
D. Deliverables
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• Pg.49: Management plan and PMP• Indicates it will draft the PMP in the first week of the project, and provided a sample outline, indicating it would include the requested requirements, which they spoke about, but didn't consolidate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

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DATE: 11/5/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

<ul style="list-style-type: none">• P- As part of communication they cited a method called the "Executive Flash Report" which is an immediate escalation of critical findings.• P - deliverables are passed through an internal review process before they are submitted in draft format to the State.• Pg.17 Process and Document Reviews: utilizes the interview and deep dive approach.• Pg.21 Monthly/Quarterly reports: met criteria.• Repository – they recommend storing in the project repository and preference to Sharepoint.
E. Reports
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 10 requirements, not pg. 16 (Part,II)• Pg. 21 Met criteria.
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• Refer to Exhibit 2-1 on pg. 23 – basically just states back they will meet requirements.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – didn't follow format, had to strip these out of overall section response.• P – planning section pg.25, they will utilize and create monthly evaluation steps.• P – design section pg. 27 participate in design discussions and support system requirements validation without significantly altering the project schedule or budget• N – Testing section, pg.32 didn't define the approach to delivery of information that would be available in this section.• P – called out on pg. 34 there could be overlap in training requirements with the vendor.• P – offering webinar training with records, for reuse.• N – lots of work with, for all these sections. Proposal doesn't indicate offer suggested approach with flexibilities.
4. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• N – didn't follow format• P – Pg.42 Comprehensive communication approach including informal day-to-day communication and then no surprises in formal documentation and correspondences.• Staffing model – Pg.42 and refers to Attachment 7

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

- | |
|---|
| <ul style="list-style-type: none">• Pg. 63 Attachment 7 Footnote under staffing model indicates they will comply with both Federal and State requirements on social distancing. Otherwise 2 onsite.• N – While they provided a list of SOM resource expectations, they didn't fully address how much time would be required and instead referred to the communication plan as a method to address these items.• N – could not find where they indicated where they would protect the Department's confidential data and not viewed/transmitted offshore. Even did specific word searches to try to find this. |
|---|

5. Management Plan (Part II.D.1.)

- | |
|---|
| <ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• Attachment 10, on pg.90 – met this requirement as a high-level outline. |
|---|

6. Implementation

- | |
|---|
| <ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• This was met. |
|---|

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Public Consulting Group

DATE: 11/10/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• I – IV & V services for over 100 projects• I – Thorough knowledge of TANF, SNAP, and MaineCare• I – Propose a “customized” IV & V approach based on our needs• I – Prior agreements with OFI• I – Experience with ACES and Siebel• I – Knowledge of Federal partner requirements• I – Included 3 related projects, 2 for IV & V, 1 for assessment.
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• - Provided
4. Litigation
<ul style="list-style-type: none">• I – Lengthy list included without settlement amounts.
5. Financial Viability
<ul style="list-style-type: none">• I – Provided – No concerns
6. Certificate of Insurance
<ul style="list-style-type: none">• I – Provided, Exp 4/1/21

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

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BIDDER NAME: Public Consulting Group

DATE: 11/10/2020

EVALUATOR NAME: Shannon Courtois

EVALUATOR DEPARTMENT: Department of Health and Human Services - CO

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
<ul style="list-style-type: none">• I – Has agile experience with IV & V services• I – Recognizes several specific risks to the project known from past experience.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I – Eclipse IV & V – Trademarked Framework – Industry leading methodology
C. Staffing
<ul style="list-style-type: none">• I – Provided chart of roles and responsibilities
D. Deliverables
<ul style="list-style-type: none">• I - PCG Insight – Mobile communications tool• I Document repository on DHHS network
E. Reports
<ul style="list-style-type: none">• I – Acknowledged• I = Executive Dashboard
2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• I – IV & V Center of Excellence (COE)• I – Eclipse IV & V – based on industry standards. Includes certification program.
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• I – Use of meaningful KPIs for comparison• I – High quality requirements – documented, actionable, measurable, testable, traceable.
4. Staffing
<ul style="list-style-type: none">• I – Ability to work remotely• I - Two workstations and laptops
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• I – Provided thorough management plan template
6. Implementation
<ul style="list-style-type: none">• I – Included detailed plan

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Public Consulting Group

DATE: 11/12/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• 100+ State projects nationally. Maine experience since 2008• Specific experience in ACES and Siebel.• Programmatic knowledge
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• None
3. Organizational Chart
<ul style="list-style-type: none">• Provided
4. Litigation
<ul style="list-style-type: none">• I-Several cases – worth looking at
5. Financial Viability
<ul style="list-style-type: none">• Adequate – Independent Auditor
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: Public Consulting Group

DATE: 11/12/2020

EVALUATOR NAME: Jeffrey Farnsworth

EVALUATOR DEPARTMENT: DHHS - OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
A. General Requirements
• Meets requirements
B. IV&V Service Requirements of the IOS Modernization Project
• Framework provided
C. Staffing
• Adequate
D. Deliverables
• Provided and complete
E. Reports
• Adequate
2. General Requirements (Part II, A.)
• Extensive, system-specific experience
3. IV&V Service Requirements of the IOS Modernization Project
• Eclipse integrated framework “insures results are standards-based and repeatable”
4. Staffing
• Specific and complete – experienced leads, relevant resumes
5. Management Plan (Part II.D.1.)
• Organized and complete
6. Implementation
• Provided and complete, but graphic lacking

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: PCG

DATE: 11/9/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

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Individual Evaluator Comments:

Part IV. Section II. Organizational Qualification and Experience (<i>File #2</i>)
1. Overview of the Organization
<ul style="list-style-type: none">• All the below are associated to File 1• Q – File 1 10 total pages that included the proposal cover page, the debarment, performance and non-collusion certification, conflict of interest form• File 2:• Experienced IV&V vendor.• I - Past experience (since 2008 with DHHS) specifically with OFI in current Programs such as TANF, SNAP, and Medicaid, and ACES and Siebel.• I – assuming MMC and Siebel need to be decoupled.• Q – Does Project #2 with OCFS meet the criteria?• Q – They were the IV&V for KOLEA (Hawaii) and didn't mention anything about CMS specific requirements or processes (MITA, MEELC)? Were those items handled by the Vendor who implemented instead?
2. Subcontractors and/or Consultants
<ul style="list-style-type: none">• P – not using.
3. Organizational Chart
<ul style="list-style-type: none">• P – Sara Panella• I – seems like a pretty large team.
4. Litigation
<ul style="list-style-type: none">• 2 Pending Matters• 12 cases closed within the past 5 years.• I – the first 2 in each group seem to be the same thing, and they called this out.
5. Financial Viability
<ul style="list-style-type: none">• Provided
6. Certificate of Insurance
<ul style="list-style-type: none">• Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: PCG

DATE: 11/9/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

Individual Evaluator Comments:

Part IV. Section III.
1. Services to be Provided (Part II)
For clarity, Services to be provided is on Pg. 16 of the RFP, and in Section III, not Part II. P - carefully and deliberately manage the project's overall vision. Especially vital with multi-vendor N – Focused this section on the Agile approach. P – they have trademarked IV&V Framework called Eclipse IV&V. I – Proposing to store all deliverables on DHHS networks
A. General Requirements
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N – didn't follow format well. Left out this section RFP requirements.• P – utilize software tools, guides, and checklists to assess the technical processes and components of IT systems• P – their methodology includes a structured "how-to" approach, which prescribes the steps necessary to perform assessments• N – still doesn't call out or explain what CMS/FNS federal requirements they are specifically familiar with and/or which would be applicable to this project specifically.
B. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 8 requirements, not pg. 16 (Part,II)• N - pg.26 Design requirements: they didn't state what artifacts they would produce as a result of their evaluations.• N – Pg. 27 Testing – doesn't address anything regarding deployment certification process and abiding by OIT's policies.
C. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – Doesn't seem to address they agree to the requirement of confidential data remaining in the Continental US.
D. Deliverables
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 9 requirements, not pg. 16 (Part,II)• N – couldn't find where they specific discussed this due to lack of following RFP format.
E. Reports
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 10 requirements, not pg. 16 (Part,II)• These are addressed on pg.7

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202010147

RFP TITLE: Integrated Online Service Independent Validation and Verification (IV&V)

BIDDER NAME: PCG

DATE: 11/9/2020

EVALUATOR NAME: Jamie Pruett

EVALUATOR DEPARTMENT: DHHS/OFI

2. General Requirements (Part II, A.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• P - created an IV&V Center of Excellence (CoE)• P - developed a proprietary Training and Certification program
3. IV&V Service Requirements of the IOS Modernization Project
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• Q – Planning section pg. 20, while there is a lot of good information here, it doesn't seem to meet the criteria of "explain how recommendations will be identified and presented by the Bidder"• P – training – they will develop a training plan.• N – training – they were weak in describing what they would need and didn't describe the critical elements asked for in the RFP.• P - Updates and assessments - They need to know and react to IV&V findings as soon as they are identified and logged
4. Staffing
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 16• Minimum of 2 workstations if on site and 2 laptops being requested if there are special software/licensing needs.• Mentioned fully supporting a WFH model, but will work collaboratively.
5. Management Plan (Part II.D.1.)
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• P – Pg.36 and attachment 10 - Management plan was accurate and already customized to some degree for this project.
6. Implementation
<ul style="list-style-type: none">• For clarity, these are the RFP Pg. 17• P - Pg.37 will use interviews and will collaborate.• I – Pg.41 Integrated Eligibility SME is only expected to have a duration of 41 total hours for the project?



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010147

RFP TITLE: Integrated Online Services Independent Validation and Verification (IV & V)

I, Shannon Courtois accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand that the evaluation process is to be conducted in an impartial manner. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the funding decision notices for public distribution.

Shannon Courtois

Signature

November 29, 2020

Date



**STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES**

**Janet T. Mills
Governor**

**Jeanne M. Lambrew, Ph.D
Commissioner**

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010147

RFP TITLE: Integrated Online Services Independent Validation and Verification (IV & V)

I, Jeffrey Farnsworth accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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DocuSigned by:
Jeffrey L. Farnsworth
0CAA6F5D06B349B...

October 29, 2020

Signature

Date



STATE OF MAINE
DEPARTMENT OF HEALTH AND HUMAN
SERVICES

Janet T. Mills
Governor

Jeanne M. Lambrew, Ph.D
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202010147

RFP TITLE: Integrated Online Services Independent Validation and Verification (IV & V)

I, Janie Prett accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Health and Human Services. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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Janie E. Prett
Signature

Date

10/29/2020